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From left, Stephen Chien, vice president at LPL Financial; Michael Brady, president of Generosity Wealth Management; Larry Sprung, founder and wealth advisor at Mitlin Financial; and Rob Burgess, reporter at Financial Planning speak Wednesday, Oct. 29, at the ADVISE AI conference at the Wynn Las Vegas. Jacob Kepler/Financial Planning

The unexpected ways AI note-takers 'accelerate' client connections
By Rob Burgess
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AI note-takers, once thought of mainly as a way to save time, are now being credited by financial advisors with a far greater impact: allowing them to stop typing, listen closely and fully engage with clients.

At firms that have embedded tools like Zocks and Jump into client meeting workflows, advisors say they're not just gaining back hours, but also deepening client relationships and even helping to train junior advisors.

Those were among the insights shared during the "AI at Every Touchpoint: Transforming the Client Meeting Lifecycle" session at Financial Planning's

ADVISE AI conference in Las Vegas. The panel, moderated by this reporter, featured Michael Brady, president of Generosity Wealth Management; Stephen Chien, vice president at LPL Financial; and Larry Sprung, founder and wealth advisor at Mitlin Financial.

Listening instead of taking notes

Sprung said he and his team have been "heavy users" of Zocks for the past 15 months, and while the tool has resulted in a "tremendous amount of time savings," its benefits go much further.

"It's been a game-changer for us in terms of everything from the pre-meeting prep, to in the meeting, to post-meeting follow-ups in terms of pushing that to the CRM," he said.

Freed from the distraction of taking meticulous meeting notes, advisors can now give their full attention to clients — listening, learning and building deeper relationships with the families, Sprung said.

"It's allowing us to accelerate people's progress in the firm," he said.

Brady uses Jump and calls himself a "super fan" of the tool; it makes him a better listener and a stronger advisor, he said. He always discloses that he is recording at the start of each meeting, telling clients, "I want to be fully present here. I'm going to have my note-taker going, and I'll send you the notes afterward."

In a year and a half, no client has objected. "Once I normalize it … they can see what's in it for them," Brady said. "Once they see the notes as part of an email, they're super impressed."

Even if it didn't save him time, Brady said he would still use Jump because it allows him to track details he may have otherwise missed.

"I'm like, 'Oh my gosh, I was writing down that you had a million-dollar Schwab account, and I missed that you just got a new dog, or something important in your life happened because I was doing something else,'" he said. "I'm a better, deeper advisor with my clients."

Using AI note-takers for professional development

The benefits go beyond client meetings. Firms are also using them to assess how advisors are contributing to (or detracting from) the meeting itself, and to coach them on how to do better.

Like Brady, Chien said LPL Financial advisors can use Jump under a partnership that began in November 2024, with thousands of advisors now on the platform.

The advisors who save the most time are those who embed AI tools in their workflows, Chien said.

"If you can share the notes with your team instantly, so everyone's on the same page about where the client is today, that is powerful," he said. "We see advisors using that for coaching. You can see who's talking a lot in the meeting, who's talking too little, who's talking too much."

This is especially useful for new advisors or client-facing employees to quickly learn the firm's style, said Chien.

"This is how we have a meeting," he said. "These are the five things we always ask. They could sit in on your meetings, but now you can just give them the Jump recording, and then they can see that and quickly get up to speed."